



**STATE OF MONTANA
MONTANA DEPARTMENT OF TRANSPORTATION
JOB PROFILE AND EVALUATION**

SECTION I - Identification

Working Title:
Transportation Planner

Department:
Transportation

Class Code Number: 193535

Division & Bureau:
Rail, Transit, and Planning Division
Multimodal Planning Bureau

Class Code Title:
Transportation Planner

Section & Unit:
Transit Section

Pay Band: 5

Work Address:
2550 Prospect Ave.
Helena, MT 59601

Position Number: 33215

Phone: 406-444-7645

☐ FLSA Exempt

☒ FLSA Non-Exempt

Profile Completed By:
Dick Turner
Multimodal Planning Bureau Chief

Work Phone:
406-444-7289

Brian Cameron
CMS, LLC

406-442-4934

Work Unit Mission Statement or Functional Description:

MDT's mission is to serve the public by providing a transportation system and services that emphasize quality, safety, cost effectiveness, economic vitality and sensitivity to the environment.

The principal goals of the Rail, Transit and Planning Division are to develop and implement a long-range multimodal construction program that addresses Montana's most important statewide transportation needs and to support the development and safety of Montana's multimodal transportation system. These dual goals are addressed through the complex interaction and interrelationship of the following three bureaus, Data and Statistics, Project Analysis, and Multimodal Planning, as well as the Program and Policy Analysis Unit.

In cooperation with the public, representatives of stakeholder groups, and local, tribal, federal, and state elected and appointed officials, the Multimodal Planning Bureau develops and implements the programs, processes, systems, and planning products necessary to make informed policy and programming decisions. Bureau responsibilities include state rail, transit, highway, and urban planning

and program administration; the statewide multimodal transportation planning process; air quality planning and programs; tourism, economic development, trade corridor, and freight planning and programs; bicycle and pedestrian planning and transportation demand management programs; and development of special studies and research products such as reports requested by the Legislature. The bureau also provides the Administrator and Director with research and analysis of emerging issues; administers rail and transit, research, planning, operating, capital and transportation-demand management grants; and manages complex computer models which predict future traffic demands.

The Transit Section is responsible for administering federal and state transit programs. Through these programs, Transit Section staff provide technical and financial assistance to local agencies, governments, and companies that provide local and intercity passenger service to Montana's transit-dependant residents. Staff members also coordinate a variety of training workshops for transit managers and drivers in areas such as passenger assistance, safety, driver education, CPR/First Aid, and board training. The section also coordinates with other state agencies that provide services to Montana's transit-dependent population; supports alternative transportation programs; and provides technical support to local governments, members of the public, and MDT staff on bicycle and pedestrian issues.

Describe the Job's Overall Purpose:

This position serves as a transportation planner and is responsible for developing and coordinating state and federally funded transportation planning projects in conjunction with local and regional partners. This includes responsibility for coordinating project application, funding proposals, and budget allocations; providing ongoing oversight and technical assistance on the administration and implementation of funded projects; and coordinating review, reporting, and corrective actions. The position is also responsible for coordinating and overseeing contract and budget processes and performing a variety of other duties as assigned. The position reports to the Section Supervisor and does not directly supervise others.

SECTION II - Major Duties or Responsibilities

% of Time

A. PROJECT DEVELOPMENT AND COORDINATION

50%

1. Analyzes state and federal transportation planning issues to develop applications for federal transit grant funds and metropolitan planning funds. This involves coordinating with local, state, and federal agencies to determine eligibility, scope, and timing of various projects; coordinating planning efforts of partners; developing planning networks; and ensuring that plans meet the needs of the state and are implemented.
2. Develops grant applications and/or reviews proposals prepared by local governments to seek additional program funding through federal sources. This involves researching transportation planning processes, local planning needs and issues, and state and federal rules to develop clear and persuasive proposals for projects; illustrating the benefits of the proposed project to the sponsor; developing specific cost projections; and negotiating conditions of funding.
3. Researches work programs for prior fiscal content and federal compliance to make recommendations to the supervisor, FHWA, and FTA on local government and local agency work programs.
4. Evaluates local applications and recommends action on applications to the supervisor, FHWA, and other interested parties based on review and evaluation of application elements compared to MDT and federal transportation planning standards, program progress to date, related funding and

technical assistance efforts (e.g., coordination with other grants), and proposed program outcomes.

5. Develops and monitors program budgets by reviewing allocations, recommendations from sub-grantees, project plans and objectives, funding agreements, and expenditures. Develops allocations to ensure adequate support is provided, and to ensure program compliance with federal, state, and MDT laws, regulations, and policies (e.g., FHWA policy guidance, FTA circulars, restrictions, USCs, CFRs, MCA, Transportation Commission requirements, legislative spending authority, etc.) by reviewing current policies and practices in relation to state and federal mandates and applicable legislation and mission mandates.
6. Analyzes funding and researches historical data, pending legislation, transportation planning studies, and other sources to identify program fiscal needs in conjunction with constituents and partner agencies throughout the state, determine spending authority requirements, make local programs aware of fiscal status, and assist in prioritizing projects based on need.
7. Provides information, project planning, and staff support to local governments and agencies, MDT management, and FHWA and FTA to facilitate effective program planning, optimize funding, and communicate on work progress and problems encountered by agencies. Presents, explains, and justifies project status reports and recommendations to identify deficiencies and opportunities, resolve problems, and ensure effective communication between funding authorities, intermediaries, and project managers.
8. Monitors and coordinates oversight of grant program activities through process reviews and personal review of reports and performance measurements; reviewing and documenting budget or goal changes; recommending program guidelines and alterations; and implementing corrective actions as necessary.
9. Researches and examines federal regulations, FHWA policy guidance and FTA circulars, restrictions, USCs, CFRs, state laws, spending authorities, and other written documents to review and disseminate transportation-planning-related data to local programs and organizations. Prepares program information and outreach materials for local projects to keep them apprised of changes in regulations or accepted practices and coordinate information necessary for state and federal administration.

B. CONTRACT AND BUDGET OVERSIGHT

45%

1. Reviews federal transit and metropolitan planning project reports and activities to ensure compliance with contracts and regulations. This includes examining program elements of sub-grant applications to evaluate compliance to federal and state regulations through quarterly narrative and statistical reports. Reviews subrecipients' quarterly reports for proper completion, timeliness, and accuracy.
2. Reports specific program problems/successes to MDT management through the annual performance report for review and submission to the federal agencies; specialized reports including budget amendment reports; and recommendations for alterations to programs based on observations.
3. Compiles and maintains performance indicators for in-house planning to provide program data for external customers, identify problems or delays that may affect project completion, and provide required information to federal agencies. This includes defining performance criteria; coordinating data maintenance, queries, and compilation of reports with Information Services

Division personnel; and providing customer assistance in generating and interpreting reports. Compiles other indicators as required through personal interview or verbal or written surveys.

4. Establishes and maintains controls to ensure the timeliness, accuracy, and regulatory compliance of financial activities by researching and analyzing problems and designing and/or identifying solutions. This involves identifying data and reporting needs; evaluating financial activities to identify accounting data that must be reported and extracted; examining state and federal regulatory reporting requirements; and evaluating GAAP and GASB requirements and pronouncements.
5. Allocates annual appropriations from the FHWA and FTA to properly establish project funding and properly reflect project funding according to state and federal requirements. This involves interpretation of state and federal sections of law requiring variable accounting and reporting procedures.
6. Analyzes the impacts of changes in accounting procedures, policies, and regulations and recommends courses of action or change and implementation strategies to management. This includes changes in transportation planning project development, monitoring, reporting, and other issues.
7. Reviews accounting and other related systems to ensure that transactions are correct and accurate. Evaluates financial transactions to ensure financial activities are processed in an accurate and timely manner. This involves reviewing accounting transactions to ensure appropriate system functioning, the accuracy of accounting data, and compliance with MDT, state, and federal laws and regulations. Develops and recommends corrective actions to appropriate parties.
8. Reconciles, adjusts, and corrects SABHRS and internal accounting systems to ensure the integrity and accuracy of accounting data and transactions. This includes balancing accounts by examining documents to identify errors; making adjustments and breaking out accounting data for reports submitted to FTA and FHWA; identifying and correcting any discrepancies between MDT on-line claims and SABHRS; coordinating accounting activities and resolving problems in coordination with project monitors and the MDT Financial Management and Accounting Bureaus; and establishing policies to ensure errors are not repeated. This may involve the creation of new accounting applications to ensure transactions post correctly.
9. Prepares various financial schedules and reports by compiling, manipulating, and collecting fiscal data. Reviews and interprets state and federal accounting and reporting guidelines and develops reporting functions.
10. Prepares monthly, quarterly, and annual financial reports for all federal programs administered by the section to provide necessary information and to ensure compliance with reporting requirements.

C. OTHER DUTIES

05%

This position performs a variety of other duties as assigned by the Supervisor in support of the bureau plans and operations. This includes exchanging information with consultants, local government officials, agency staff, and the public; providing training, education, and professional and technical assistance; coordinating special projects; participating in ongoing training and educational programs; and performing a variety of other duties as directed.

2. ***Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:***

Problems and decisions relate to assessing a broad range of transit service and assistance, and related issues to prioritize limited resources to best enhance statewide and local planning processes, public safety, and prevent or reduce accidents. The position is responsible for analyzing and evaluating state and local needs and objectives, available resources, applicable regulations, and new methods and technologies to develop and implement assistance and coordination programs throughout Montana. The position is also responsible for evaluating program and project funding proposals to determine the most viable, effective, and efficient methods for addressing various issues. The position develops revenue forecasts for transportation plans and programs, develops budgets for implementing section activities; recommends reimbursement of eligible expenditures for local work programs, grants, and contracts and ensures that accounting documentation, auditing, and filing procedures comply with federal and state grant requirements; and originates and coordinates funding agreements and contracts with grant recipients, local governments, and other state agencies to define roles, responsibilities, and funding commitments.

3. ***The most complicated aspect of this position is:***

The most complex aspects of the position involve researching, identifying, and synthesizing the input of federal, state, local, community, and multi-jurisdictional transportation partners and stakeholders into a comprehensive statewide local planning process with limited resources. The position must continually identify and implement new funding, partnership, and service delivery opportunities and interpret, apply, and defend federal and state laws, regulations, and MDT and Transportation Commission policies in the context of statewide and local planning processes that involve members of the public and local officials who have little knowledge of these requirements. There is a great deal of diverse needs and opportunities throughout the state, so the position must conduct advanced analysis to determine where to most effectively and strategically target efforts to achieve program goals.

4. ***Guidelines, manuals, or written procedures that support this position include:***

Available guidelines, manuals, and written procedures include available to the incumbent include Department mission; Federal Highway Administration (FHWA), Federal Transit Administration (FTA) regulations; management and financial systems including Federal Grants Management procedures; Federal Circulars; Generally Accepted Accounting Principles; Federal Grants Manual; and the Automated Federal Grants Tracking System, and other regulations. General guidelines are set forth through State and Department rules and regulations (e.g., ARM, MOM, MCA, etc.).

5. ***Which of the duties and/or specific tasks listed under 1. (above) are considered "essential functions" that must be performed by this position (with or without accommodations)? (If you need information or training on the identification of essential functions, please contact MDT Human Resources Division.)***

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

Duty A: Project Development and Coordination

Duty B: Contract and Budget Oversight

The following mental and physical demands are associated with these essential functions:

PHYSICAL

- Light lifting (less than 10 lbs.)

- Carry light items (papers, books, small parts)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Travel within the state to project location
- Operating a personal computer
- Communicate in writing, in person, and over the phone

MENTAL

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Decision making that affects public health and safety
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing
- Coordinating
- Synthesizing
- Negotiating
- Instructing

6. ***Does this position supervise others?*** ☐ Yes ☒ No

Number directly supervised: 0.0

Complexity level of the positions supervised: N/A

Position Number(s) of those supervised: N/A

7. ***This position is responsible for:***

- | | | | |
|---|-------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Hiring | <input type="checkbox"/> Firing | <input type="checkbox"/> Supervision | <input type="checkbox"/> Pay Level |
| <input type="checkbox"/> Performance Management | <input type="checkbox"/> Promotions | <input type="checkbox"/> Discipline | |
| <input type="checkbox"/> Other: | | | |

8. ***Attach an Organizational Chart.***

ATTACHED

SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.

Critical knowledge and skills required for this position:

KNOWLEDGE:

The position requires an advanced knowledge of the principles and practices of transportation planning; research and analysis practices; business administration; Generally Accepted Accounting Principles; Governmental Accounting, Auditing, and Financial Reporting requirements; and state and federal rules and regulations related to grant administration. The position also requires knowledge of SABHRS; MDT funding structures; Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) regulations; and the Automated Federal Grants Tracking System.

SKILLS:

This position requires skills in project planning and oversight; written and verbal communication, facilitation, and negotiation; data collection and analysis, operation of standard and specialized office equipment and software (e.g., SABHRS, Federal Grants Tracking System, etc.), and conducting compliance and process reviews.

Behaviors required to perform these duties?

- **Customer Service:** Discovers and meets internal and external customers' needs in a manner that provides satisfaction for the customer. Anticipates future needs of internal/external customers.
- **Communication:** Provides information to co-workers, customers, and the public through clear and concise verbal and written communication. Produces professional-quality reports. Demonstrates ability to develop rapport and maintain long-term associations with others both internal and external to the agency.
- **Commitment and Loyalty:** Ability and willingness to align behavior with the needs and goals of the organization and provide a visible role model for others. Reliable and dependable. Holds self accountable for organizational activities, services, decisions, successes, and failures. Demonstrates an understanding of the link between job responsibilities and overall organizational goals and needs. Performs the job with broader goals in mind.
- **Knowledge of the Job:** Ability to carry out responsibilities effectively. Is aware of how own role/position fits in the organization mission. Understands the policies, procedures, rules, and laws that govern the work and exercise judgment in making necessary interpretations.
- **Analytical/Interpretive Thinking:** Accurately applies general standards and requirements to specific transportation planning issues.

Education:

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- | | |
|---|--|
| <input type="checkbox"/> No education required | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| <input type="checkbox"/> High school diploma or equivalent | <input checked="" type="checkbox"/> Related Bachelor's Degree |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree |

Please specify the acceptable and related fields of study:

Required/Acceptable: Civil Engineering, Statistics, Geography, Cartography, Planning

Related: Public Administration, Computer Science, Business, Social Services, Communication, Education, Economics, Mathematics, Natural Sciences, Social Sciences, Finance, Accounting

Other education, training, certification, or licensing required (specify): None Specified

Experience:

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

☐ No prior experience required
☐ 1 to 2 years

☒ 3 to 4 years
☐ 5 or more years

Other specific experience (optional): NONE SPECIFIED

Alternative Qualifications:

This agency will accept alternative methods of obtaining necessary qualifications.

☒ Yes ☐ No

Alternative qualifications include: Candidates with a relevant two-year degree plus five years of experience in transportation planning, engineering, programs, or finance may also be considered. Candidates without a relevant two-year degree must have seven years of experience in transportation planning, engineering, programs, or finance.

SECTION IV – Other Important Job Information

NONE SPECIFIED

SECTION V – Signatures

Signature indicates this statement is accurate and complete.

Employee:

Name: _____ Title: _____

Signature: _____ Date: _____

Immediate Supervisor:

Name: _____ Title: _____

Signature: _____ Date: _____

Division/District Administrator:

Name: _____ Title: _____

Signature: _____ Date: _____

Department Designee:

Name: _____ Title: _____

Signature: _____ Date: _____

Recruitment Review: My signature below attests to my review of and determination that the minimum qualifications (education and experience) listed in this profile meet the established recruitment standards of MDT.

Name: _____ Title: Human Resource Specialist (Helena/District)

Signature: _____ Date: _____